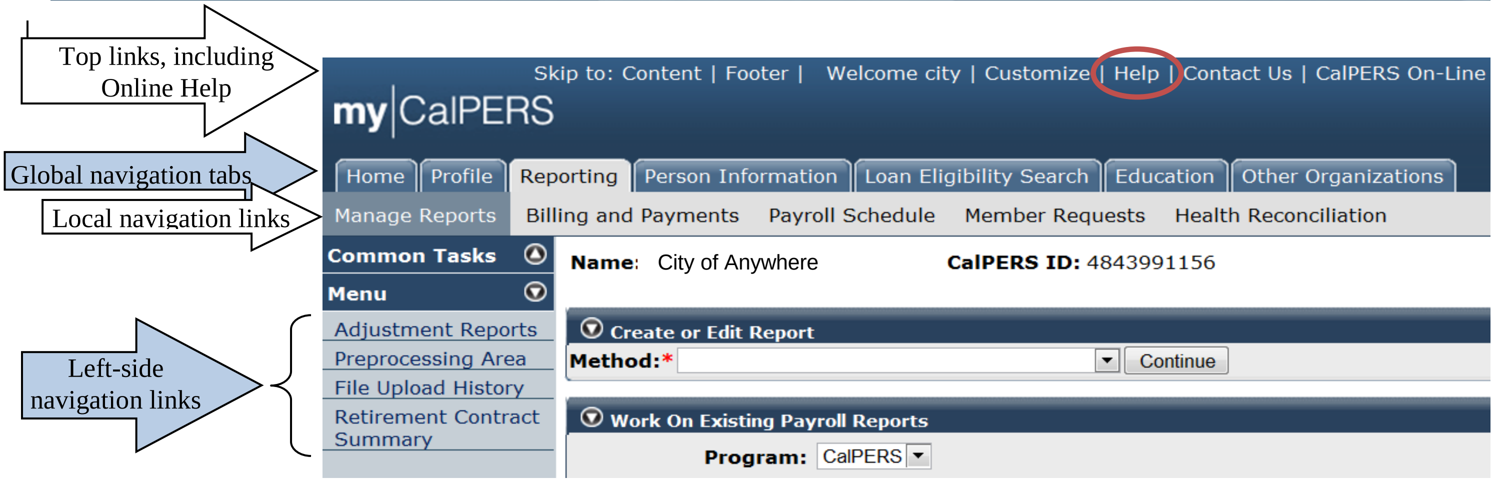
my|CalPERS Online Data Entry Help Sheet
Health for Public Agencies & Schools



<u>my|CalPERS Navigation</u>

- **Online Help**: Provides detailed information and required steps needed to utilize my|CalPERS
- **Global Navigations Tabs**: Provide access to high level functions within my|CalPERS
  - **Profile Tab** – employer demographics, contacts, business relationships, contracts, and agreements
  - **Reporting Tab** - reporting retirement enrollments, health enrollments, and payroll transactions
  - **Person Information Tab** – search for person details by SSN or CalPERS ID
  - **Other Organizations Tab** – general PERS-related information
- **Local Navigation Links**: Provide access to specific pages within my|CalPERS
- **Left-Side Navigation Links**: Provide supporting access and access to common tasks
- **Multiple browser windows**: *e.g. one for query, one for processing transactions*
  1. Right click on <u>any</u> of the global navigation tabs.
  2. From the pop-up dropdown menu, select Open in New Window.
  3. A separate browser window will open.
- Selecting the **Home** global navigation tab, or the top-left **my|CalPERS** link, will refresh the data. It's important to refresh when performing a query or new transaction for a different Participant. This is not necessary when working with the Reporting global navigation tab.
- The Internet browser **Back arrow** or **Backspace key** will return you to the previous screen; however, it might create an occasional error page, especially after you save your transaction.

<u>Health Transactions:</u>

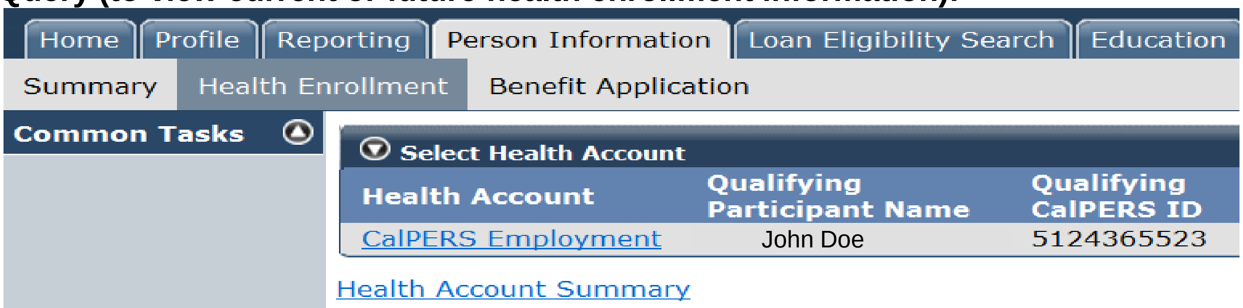
To begin processing transactions, select the **Reporting** global navigation tab. Within the *Create or Edit Report* section (see the screen shot at the top of this Help Sheet), select "Add or Edit Health Enrollment" from the dropdown.

Health Transactions Quick Tips:

- **Add New** button**:** Use to process a new *<u>transaction</u>* (not necessarily a New Enrollment)
- **Open Enrollment transactions (new enrollment, change health plan, add or delete dependents, and cancel coverage):** From the Health Event Type field, select "Open Enrollment" from the dropdown before selecting the Health Event Reason
- **Rescissions:** Can be only be done by employers if transaction is:
  - permissive with a future effective date, or
  - in pending-analyst-review status

Health Transactions Quick Tips (continued):

- **Pending Retirement Health Coverage:** If there is a pending retirement and the participant needs health coverage, once the health is canceled, process a Direct Pay by using:
    - **Health Event Type**: Continued Enrollment
    - **Health Event Reason**: Pending Retirement
- **Query (to view current or future health enrollment information):**



1. Select **Person Information** global navigation tab
2. Enter the employee's CalPERS ID or Social Security number in the SSN / Federal or Individual Tax ID field, then select **Search** button
3. Select the **Health Enrollment** local navigation link
   (**Note**: Only select **Health Account Summary** link for high-level health information such as the health plan name and party rate)
4. Select the **CalPERS Employment** link* for detailed enrollment information such as history, dependents, deductions, and future and pending transactions
   *This link will not always read **CalPERS Employment**. It could be different depending on the participant's status i.e., "CalPERS Retiree."

- **Permanent Separation:** For all Participants:
    - Process a permanent separation
        1. Select the **Person Information** global navigation tab
        2. Enter the Participant's SSN or CalPERS ID, then select the **Search** button
        3. In the Appointment History section, select the *Active* **Employer** link
        4. In the Appointment Event History section, select the **Add New** button
        5. Populate the Event Details (Event, Event Date, Separation Reason)
        6. Select the **Save** button
    - my|CalPERS will automatically cancel the health effective the first day of the second month

Participants who have health benefits and are separating for retirement

- **If PERS:** Process a permanent separation (unless it's disability retirement related)
- **If NonPERS:** If employee is eligible to continue health, follow two-step process:
  1. Permanent Separation (my|CalPERS will cancel the health)
  2. New Health Enrollment:
     a. **Health Event Type:** New Enrollment
     b. **Health Event Reason:** Retirement
- **If STRS:** Process a Permanent Separation
    - After receiving the permanent separation notification, CalSTRS will verify retirement and benefit roll dates
    - If employee is eligible, my|CalPERS will continue the health automatically

Disabled Dependent

The my|CalPERS process for a new health enrollment with a disabled dependent is now:

1. Employer receives the health enrollment form for a new employee with a disabled dependent.
2. Employer completes the new enrollment transaction in my|CalPERS for the employee and all dependents, except the disabled dependent.
3. Employer keys a second transaction for the disabled dependent using:
   a. **Health Event Type**: Add Dependent
   b. **Health Event Reason**: Medically Disabled
4. my|CalPERS will send a Member Questionnaire form and a Medical Report form to the member
   a. Employee will complete the Member Questionnaire and return it to CalPERS
   b. The Medical Report should be given to the disabled dependent's physician (***Note:*** *The form instructs the physician to fax or mail the Medical Report directly to CalPERS)*
5. The transaction will be placed in "pending analyst review" status.
6. A notice will be sent to the subscriber and employer, and the health carrier will receive notification via an electronic file.

Billing & Payments:

- **Due Date:**
  - *Always* pay as billed.
  - Due date for payment is *always* the 10th of the month.
- **Billing statement**: This will be generated on the 14th of the month.
  - Agencies will be notified via a circular letter as to the actual statement generation dates one year in advance.
  - Employers can opt to receive their Health Premium Billing Invoice online by selecting **email** as their preferred communication method.
  - Employers that select **mail** as their preferred communication method will continue to receive their Health Premium Billing Invoice by mail.
- **Cut-off dates:**
  - For PERS and NonPERS, cut-off dates are no longer an issue:
    - Statements will reflect a participant's health enrollment as of 5:00 p.m. on the date the statement is generated.
      - For example, if an employer added a dependent to a participant's health account on the 14th of the month (prior to 5:00 p.m.), and the statement generated the night of the 14th (approx. 11:00 p.m.), the statement/billing roster will reflect that the dependent was added to the health account.
  - For STRS, cut-off dates are also no longer an issue, except:
    - The STRS annuitant's warrant will reflect what was sent to STRS on the 4th of the month.
      - If a change has been made to an annuitant's health account between the 4th and 14th of the month, the statement will reflect the add/change/delete; however, the warrant will not.
      - Changes will be reflected when the next STRS health deduction file is sent along with any under/over payment adjustments which will be reflected in the annuitant's subsequent warrant.

Billing & Payments (continued):

- **Two online payment options**
  1. **Debit method:** Employers will authorize payments via my|CalPERS
  2. **Credit method:**
     a. Employers will initiate and authorize payments through their financial institution.
     b. The employer must notify the CalPERS Fiscal division.
     c. This method is not set up via my|CalPERS, nor are payments paid using my|CalPERS.

Note: Both debit and credit payments will be viewable in my|CalPERS

Help Options:

- **Online Help:** Select **Help** link at top of page, and then select **Index** to do keyword search by topic
- **Call CalPERS:** Call toll free at **888 CalPERS** (or **888**-225-7377)
- **Review the computer-based training (CBT) courses:** Register for courses from the PERT area of CalPERS On-Line
- **Email CalPERS:** Select **Ask CalPERS** within CalPERS On-Line
  (Note: In order to protect the confidential information of our members, **do not** include a Social Security number in your email or your inquiry will not be processed.)
- **Submit an "Inquiry" within my|CalPERS:** Allows *confidential* information (such as SSNs, employee enrollment details, etc.) to be transmitted securely, and will be assigned to CalPERS staff to work.
  1. Select the **Common Tasks** left-side navigation heading.
  2. Select the **Submit Inquiry** left-side navigation link.
  3. Submit your Inquiry.
  4. CalPERS staff will review and respond to the Inquiry.
  5. You will be sent an emailed notification when the response is available.
  6. Select the **Inquiry List** left-side navigation link to view the response.